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FISHERY COMMODITY SITUATION AND OUTLOOK 1984/85

by

Fish Utilization and Marketing Service
Fishery Industries Division
Fisheries Department

FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS
Rome, April 1985

Abstract

This paper examines the situation in world fish production and trade in fishery commodities in 1984, and notes the trends becoming apparent in 1985, using statistical information available up to January of that year. This was supplemented by information from the GLOBEFISH Databank.

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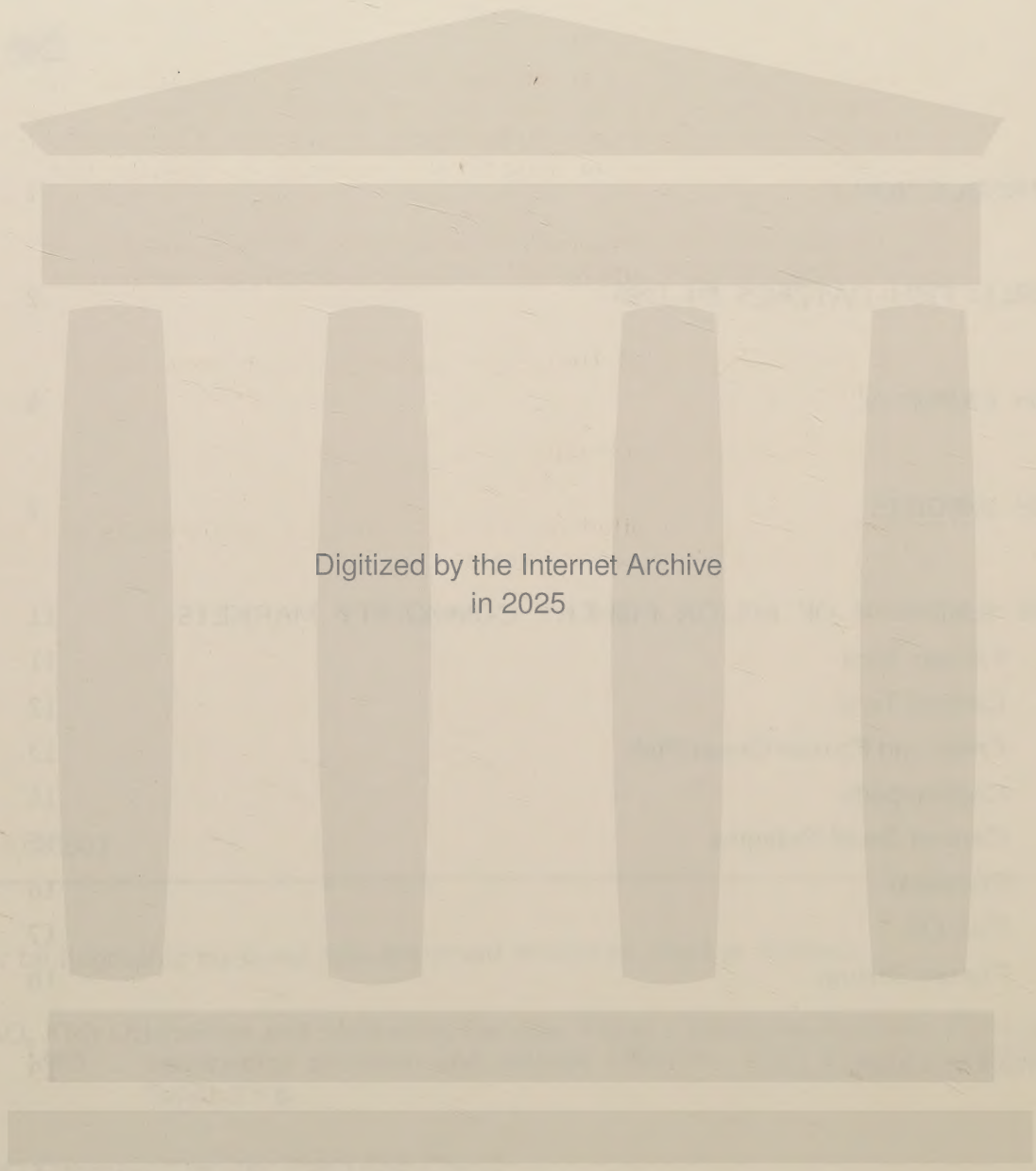

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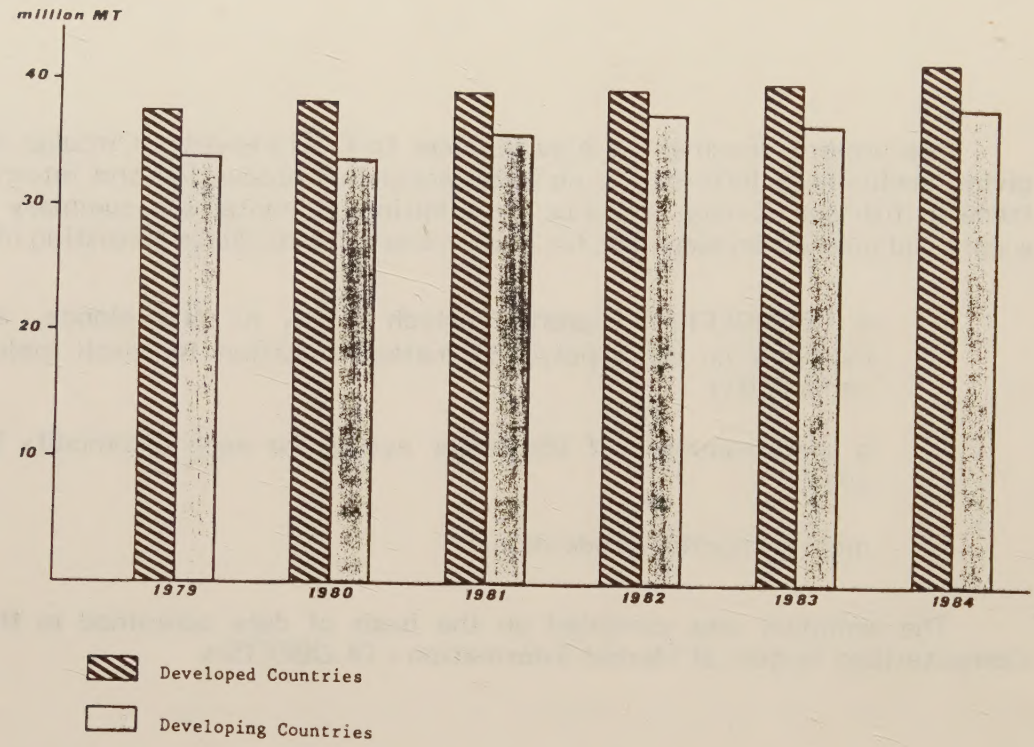
INTRODUCTION

The present document is a supplement to FAO Fisheries Circular No. 782 giving preliminary information on 1984 world fish production and international trade in fish and fishery products. In addition, it contains a summary on the supply and market development for main fishery commodities consisting of:

- a "GLOBEFISH Snapshot" which gives, at one glance, an overview on the supply and market situation for each major commodity;
- a short summary of the major events for each commodity in 1984;
- main production/trade data.

The summary was compiled on the basis of data contained in the FAO Computerized System of Market Information - GLOBEFISH.

WORLD FISH CATCHES IN 1984



After the "El Niño" year 1983, when world fish catches had been negatively affected, 1984 may be a record year. **Preliminary data indicate that total fish catches may reach the all-time high of 80 million tons.** This increase was almost equally distributed between developing and developed countries. Among the latter, higher catches of the world's major fishing nations, Japan and USSR, boosted the total result, however. The European Community's production failed to grow, with Denmark and France reporting lower catches. Among the North American countries, the setback in fish catches by Canada, mainly because of lower groundfish landings, was more than offset by higher production of the USA.

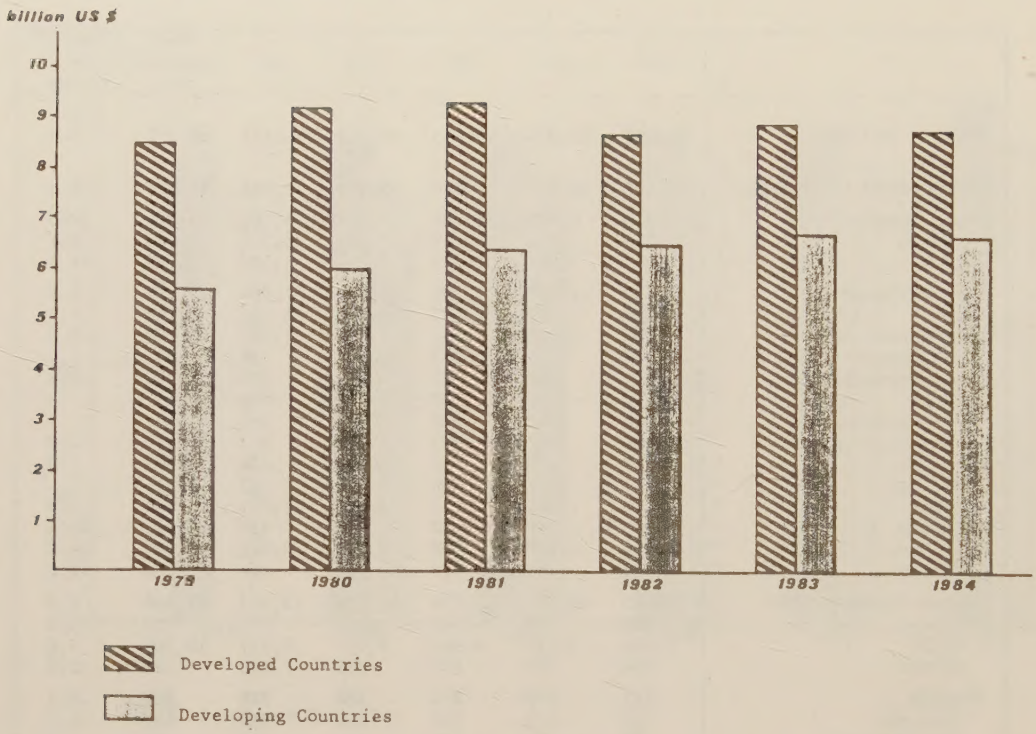
Due to recovery of small pelagic stocks in Latin America, massive increases in landings were reported by those countries which had been mainly affected by the "El Niño" phenomenon but without reaching the 1982 levels. Overall Latin American production increased by some 16 percent with Chile accounting again for more than 40 percent of Latin American landings. Fish production in developing Asia continued at a high level, contributing more than 20 million tons to the world total. Increases were reported for India, Bangladesh, Rep. of Korea and Burma. For other major producers such as China, Thailand, Indonesia, no official data are yet available but preliminary data indicate an overall upward trend.

Table 1

World catch of Aquatic Organisms (in 1000 tons)

	1979	1980	1981	1982	1983	1984 preliminary	1984/1983 % change
WORLD TOTAL	71,060	72,006	74,835	76,539	76,461	80,121	4.8
DEVELOPED COUNTRIES	37,136	38,230	38,884	39,248	39,934	41,927	5.0
North America	4,926	4,982	5,184	5,391	5,480	5,984	10.0
Canada	1,415	1,347	1,417	1,403	1,337	1,243	-7.1
USA	3,511	3,635	3,767	3,988	4,143	4,741	14.5
Western Europe	11,162	11,250	11,301	10,887	11,094	11,299	1.8
EEC :	4,738	5,064	5,073	5,238	5,117	5,067	-1.0
Denmark	1,738	2,028	1,852	1,927	1,861	1,837	-1.3
France	742	794	781	746	784	794	1.2
Germany, F.R.	357	307	331	314	306	300	-1.8
Italy	426	448	450	476	478	...	-
Netherlands	324	340	434	506	503	...	-
United Kingdom	906	847	883	912	847	813	-4.0
Others	245	299	341	358	338	342	1.3
Portugal	243	271	260	253	247	...	-
Spain	1,205	1,265	1,257	1,374	1,227	1,244	1.3
Iceland	1,645	1,515	1,442	789	839	1,515	80.6
Norway	2,658	2,409	2,552	2,501	2,822	2,420	-14.2
Others	672	726	719	732	842	806	-4.2
Eastern Europe & USSR	10,195	10,702	10,779	11,216	11,163	11,864	6.3
Poland	601	638	630	608	735	710	-3.4
USSR	9,050	9,476	9,546	9,957	9,757	10,500	7.6
Others	544	589	603	651	671	654	-2.5
Oceania	227	228	254	286	320	319	-0.3
Australia	128	132	147	167	169	160	-5.2
New Zealand	99	95	108	119	151	159	5.3
Other Developed Countries	10,627	11,069	11,366	11,468	11,878	12,463	4.9
Israel	27	26	25	24	22	23	2.9
Japan	9,946	10,428	10,733	10,820	11,256	11,800	4.8
South Africa	654	615	607	624	600	640	6.7
DEVELOPING COUNTRIES	33,924	33,776	35,951	37,291	36,527	38,194	4.6
Africa	3,406	3,321	3,472	3,280	3,575	3,372	-5.7
Morocco	285	330	390	362	440	450	2.3
Ghana	227	224	231	239	245	238	-2.8
Nigeria	535	480	496	512	515	...	-
Senegal	243	250	207	213	213	...	-
Tanzania	180	229	231	224	273	263	-3.6
Namibia	331	238	254	202	341	163	-52.3
Others	1,604	1,570	1,663	1,528	1,548	1,530	-1.2
Latin America	10,261	9,648	10,605	11,416	9,167	10,653	16.2
Mexico	955	1,222	1,536	1,324	1,070	1,193	11.5
Chile	2,632	2,817	3,385	3,673	3,982	4,445	11.6
Ecuador	609	644	731	654	307	450	46.4
Peru	3,715	2,735	2,740	3,484	1,487	2,330	56.7
Argentina	568	385	362	475	416	298	-28.4
Brazil	855	820	829	829	845	...	-
Uruguay	108	120	147	119	144	...	-
Others	819	905	875	858	917	949	3.5
Near-East (Africa & Asia)	897	992	1,012	1,039	1,122	1,122	-0.0
Southern Asia	3,484	3,596	3,695	3,682	3,876	4,204	8.5
Bangladesh	646	650	687	725	729	751	3.1
India	2,340	2,442	2,444	2,367	2,541	2,840	1.1
Others	499	504	564	590	606	613	1.1
East & S.E. Asia	15,744	16,063	17,039	17,770	18,664	18,718	0.3
Burma	564	580	595	584	586	613	4.6
China	4,054	4,235	4,377	4,927	5,213	...	-
Indonesia	1,743	1,842	1,903	1,999	2,112	...	-
Korea, Rep.of	2,163	2,091	2,366	2,281	2,400	2,477	3.2
Malaysia	696	737	804	683	723	653	-9.8
Philippines	1,475	1,557	1,687	1,788	1,837	...	-
Thailand	1,946	1,793	1,989	2,120	2,225	...	-
Others	3,113	3,229	3,319	3,389	3,543	3,563	0.6
Other Developing Countries	122	128	128	104	123	126	2.2

FISH EXPORTS



While export volumes in 1984 stayed on 1983 levels, the overall depressed prices of the main fish commodities caused a **decrease in export value.** Both developed and developing countries experienced a downward trend in export earnings. For the first time after years of continuous expansion, the developing countries failed to expand their share in total fish exports, staying on the 1983 level of 43 percent.

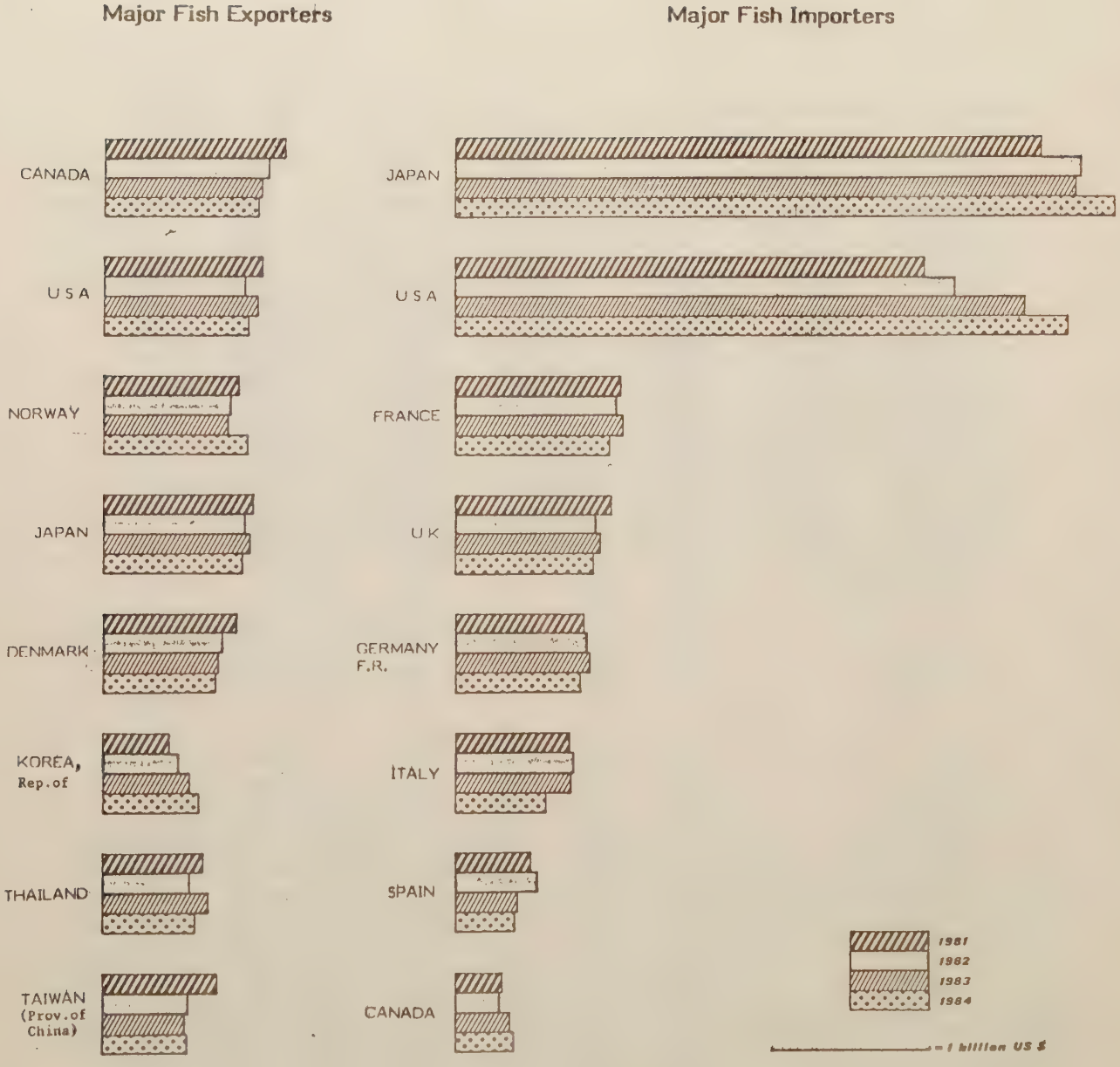
Canada remained the leading exporter, despite falls in volume and value for the second successive year. Among the other leading fish exporters (USA, Norway, Japan and Denmark), Japan was the only one which succeeded in expanding its exports, reaching the 1980 record level of over 900 million US$, mainly because of higher frozen tuna exports to USA and Thailand and canned tuna exports to USA and UK. The European Community experienced a decline in exports by about 6 percent.

The Republic of Korea, which is the leading exporter of fishery products among developing countries (sixth in the world league), stayed on the 1983 level. Thai fish exports were up for the fifth consecutive year, boosted by higher shipments of canned tuna to the USA, UK and the Federal Republic of Germany. Chilean revenue from fish exports stayed at the 1983 level; the shipment of fishmeal reached 780,000 tons, but total value of this commodity dropped by 10 percent. This decline was offset by higher exports of frozen fish and fish oil.

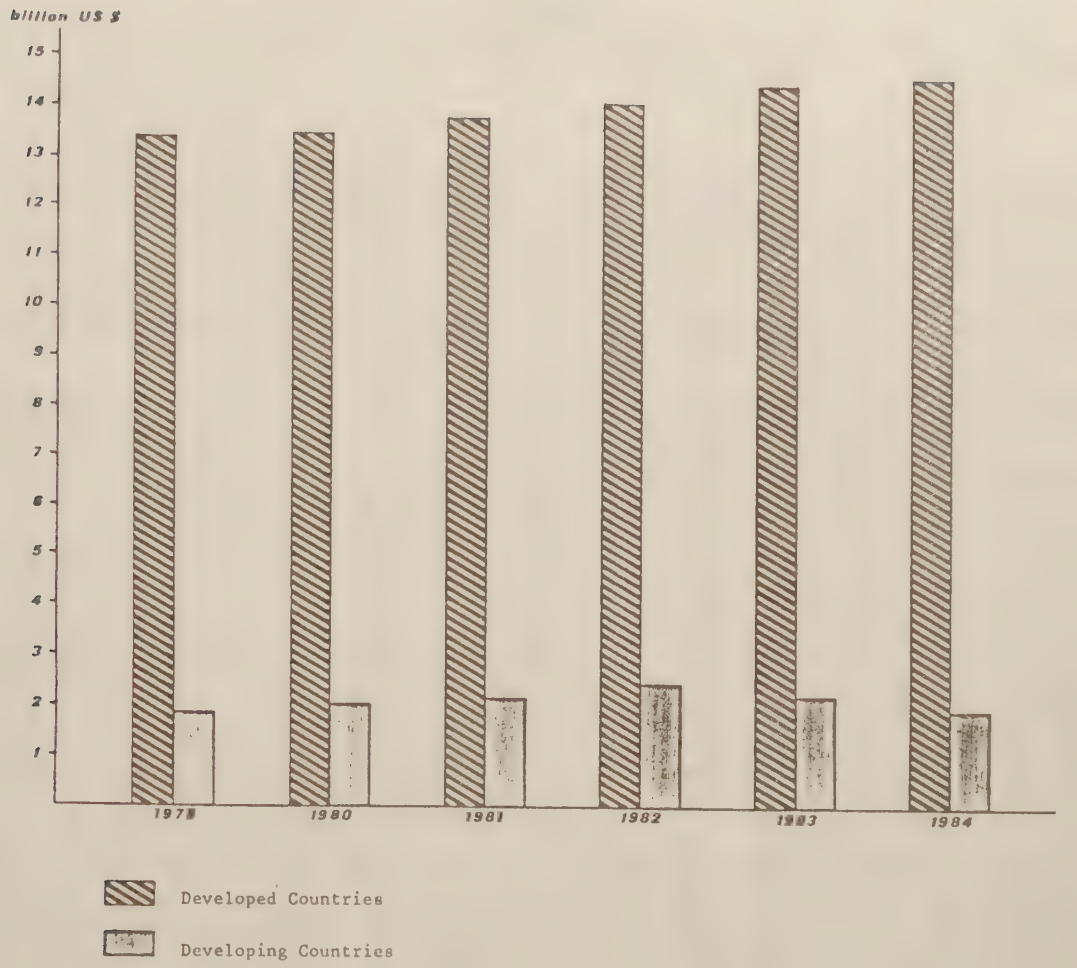
Table 2

Exports of fish and fishery products (million US$)

	1979	1980	1981	1982	1983	1984 preliminary	1984/1983 % change
WORLD TOTAL	14,161	15,210	15,767	15,272	15,729	15,622	-0.7
DEVELOPED COUNTRIES	8,527	9,201	9,311	8,746	8,986	8,886	-1.1
North America	2,186	2,087	2,403	2,332	2,276	2,221	-2.4
Canada	1,115	1,094	1,261	1,300	1,279	1,235	-3.4
USA	1,071	993	1,142	1,032	997	986	-1.1
Western Europe	4,762	5,275	5,155	4,674	4,856	4,645	-4.4
EEC :	2,512	2,814	2,624	2,594	2,686	2,534	-5.7
Denmark	859	1,000	940	901	928	892	-3.9
Germany, F.R.	280	317	279	316	306	288	-5.9
Netherlands	503	525	512	504	511	458	-10.4
United Kingdom	331	365	308	290	312	305	-2.2
Other	539	607	585	583	629	591	-6.0
Other Western Europe :	2,250	2,461	2,531	2,080	2,170	2,111	-2.7
Faeroe Islands	125	162	145	142	166	153	-7.8
Iceland	595	709	713	539	527	532	1.0
Norway	891	975	1,002	888	978	915	-6.4
Portugal	99	122	89	91	91	90	-1.0
Spain	410	344	440	289	281	305	8.5
Other Countries	130	149	142	131	127	116	-8.7
Eastern Europe & USSR	398	398	340	339	433	400	-7.6
Eastern Europe	98	97	97	121	109	...	-
USSR	300	301	243	218	324	...	-
Other Developed Countries	1,181	1,441	1,413	1,401	1,421	1,620	14.0
Australia	224	270	269	314	319	350	9.7
Japan	720	905	863	801	788	910	15.5
South Africa	132	105	101	94	103	118	14.6
DEVELOPING COUNTRIES	5,634	6,009	6,456	6,526	6,743	6,736	-0.1
Africa	392	464	607	617	719	692	-3.8
Morocco	108	119	193	155	199	206	3.5
Senegal	93	104	106	145	138	140	1.5
Others	191	241	308	317	382	346	-9.4
Latin America	1,897	2,262	2,167	2,230	2,171	2,178	0.3
North America	108	152	154	110	121	106	-12.4
Central America :	595	735	635	545	555	530	-4.5
Mexico	455	580	494	388	394	370	-6.1
Panama	57	66	58	69	73	70	-4.1
Others	83	89	83	88	88	90	2.3
Caribbean	145	141	137	176	183	185	1.1
South America :	1,049	1,234	1,241	1,399	1,312	1,357	3.4
Argentina	205	143	141	184	172	160	-7.0
Brazil	145	133	156	162	137	166	21.2
Chile	225	323	327	386	419	416	-0.7
Ecuador	104	200	189	219	239	220	-8.0
Peru	278	322	271	289	172	230	33.7
Others	92	113	157	159	173	165	-4.6
Near-East (Africa & Asia)	66	77	98	110	117	112	-4.3
Asia	3,154	3,063	3,442	3,447	3,605	3,709	2.9
Southern Asia :	422	383	441	507	514	526	2.3
India	311	269	315	355	349	356	2.0
Others	111	114	126	152	165	170	3.0
East & South-East Asia :	2,437	2,371	2,676	2,626	2,809	2,817	0.3
Taiwan (Prov.of China)	486	557	623	540	651	570	-12.4
Hong Kong	191	165	179	217	210	238	13.3
Indonesia	221	211	204	232	267	280	4.9
Korea, Rep.of	795	678	835	758	735	732	-0.4
Malaysia	168	127	130	118	104	100	-3.9
Philippines	95	142	146	120	132	122	-7.6
Singapore	101	118	135	139	150	162	8.0
Thailand	363	358	412	482	545	600	10.1
Others	17	15	12	20	15	13	-13.3
Centrally Planned Economies:	343	344	368	390	358	366	2.2
China	295	309	325	314	282	300	6.4
Asia - Other	48	35	43	76	76	66	-13.2
Oceania	77	108	99	46	55	45	-18.2


Major Fish Exporters
Major Fish Importers
CANADA
USA
NORWAY
JAPAN
DENMARK
KOREA, Rep.of
THAILAND
TAIWAN (Prov.of China)
JAPAN
USA
FRANCE
UK
GERMANY F.R.
ITALY
SPAIN
CANADA
1981
1982
1983
1984
= 1 billion US $

FISH IMPORTS



There was an **increase in imports volumewise**, brought about mainly by higher fish oil and fishmeal imports. **Developing countries further reduced fish imports**, especially fish for human consumption. Their share in total fish imports consequently dropped further to only 21 percent of quantity and 12 percent of value. Major decreases were reported by African countries, which might have had a negative impact on the overall supply of fish in these countries.

Japan continues as the biggest importer of fish products, accounting for one-fourth of world fish trade value; in 1984 increases both in import quantity and value were reported. The USA, the second largest importing country, reported an 8 percent higher import value in 1984 as compared to 1983. These two markets, which account for almost one-half of the world's import, are characterized by high-value product imports, which are more and more supplied by developing countries.

The European Economic Community reported higher quantities of food fish imports, but at lower unit prices. The bulk of the EEC trade is intraregional with the Federal Republic of Germany and UK as major import markets. The German market was characterized by higher imports of saithe, cod and redfish, but at lower prices, expressed in US dollars. UK reported higher imports of cod and canned tuna, both at considerably depressed US dollar unit values.

Table 3

Imports of fish and fishery products (Q = 1000 t product weight; V = million US$)

		Total Fish Products				Fish For Human Consumption				Fishmeal			
		1982	1983	1984 P	84/83 %	1982	1983	1984 P	84/83 %	1982	1983	1984 P	84/83 %
WORLD TOTAL	Q	**10285**	**10209**	**10399**	**1.9**	**7044**	**7181**	**7211**	**0.4**	**2450**	**2299**	**2347**	**2.1**
	V	**16542**	**16636**	**16538**	**-0.6**	**15203**	**15322**	**15255**	**-0.4**	**1021**	**1029**	**943**	**-8.4**
DEVELOPED COUNTRIES	Q	**7638**	**7898**	**8194**	**3.8**	**5167**	**5589**	**5714**	**2.2**	**1720**	**1653**	**1658**	**0.3**
	V	**14085**	**14445**	**14582**	**1.0**	**13115**	**13481**	**13582**	**0.8**	**687**	**723**	**673**	**-6.9**
North America	Q	**1139**	**1217**	**1258**	**3.4**	**1052**	**1140**	**1167**	**2.4**	**80**	**68**	**83**	**22.1**
	V	**3456**	**3957**	**4153**	**5.0**	**3424**	**3928**	**4217**	**7.4**	**26**	**23**	**31**	**34.8**
Canada	Q	90	101	117	15.8	87	94	110	17.0	3	6	7	16.7
	V	281	336	360	7.1	281	334	358	7.2	0	1	2	100.0
USA	Q	1049	1116	1141	2.2	965	1046	1057	1.1	77	62	76	22.6
	V	3175	3621	3893	7.5	3143	3594	3849	7.4	26	22	29	31.8
Western Europe	Q	**4751**	**4604**	**4810**	**4.5**	**2758**	**2739**	**2825**	**3.1**	**1289**	**1251**	**1214**	**-3.0**
	V	**6012**	**5836**	**5428**	**-7.0**	**5229**	**5079**	**4627**	**-8.9**	**526**	**541**	**503**	**-7.0**
EEC :	Q	3626	3485	3679	5.6	2086	2140	2219	3.7	868	761	736	-3.3
	V	4563	4540	4205	-7.4	3979	4014	3632	-9.5	339	327	296	-9.5
Denmark	Q	283	277	270	-2.5	271	265	255	-3.8	10	11	14	28.3
	V	298	309	309	0.0	294	305	302	-1.0	3	4	6	50.0
France	Q	509	531	534	0.6	438	465	470	1.1	60	57	55	-3.5
	V	1036	1050	973	-7.3	1007	1021	950	-7.0	25	25	20	-20.0
Germany, F.R.	Q	925	916	1056	15.3	379	404	510	26.2	356	351	324	-7.7
	V	823	831	784	-5.7	632	634	571	-9.9	125	143	129	-9.8
Italy	Q	401	404	346	-14.4	320	320	281	-12.2	76	78	60	-23.1
	V	753	735	576	-21.6	716	698	543	-22.2	34	35	30	-14.3
Netherlands	Q	409	362	421	16.3	153	139	153	10.1	73	45	52	15.6
	V	310	273	281	2.9	216	195	183	-6.2	28	20	21	5.0
United Kingdom	Q	788	706	766	6.7	325	346	362	4.6	214	163	173	6.1
	V	886	909	877	-1.0	707	766	720	-6.0	89	73	70	-4.1
Other	Q	311	289	286	-1.0	200	201	197	-2.0	79	56	58	3.6
	V	457	433	405	-6.5	407	395	374	-5.3	35	27	20	-25.9
Other Western Europe :	Q	1125	1119	1131	1.1	672	599	606	1.2	421	490	478	-2.5
	V	1449	1296	1223	-5.6	1250	1065	995	-6.6	187	214	207	-3.3
Portugal	Q	96	98	97	-1.0	95	98	97	-1.0	1	...	...	-
	V	182	141	120	-14.9	182	141	120	-14.9	1	...	...	-
Spain	Q	328	269	287	6.7	324	258	280	8.5	2	8	4	-50.0
	V	526	396	380	-4.0	525	392	378	-3.6	1	3	1	-66.7
Sweden	Q	207	207	208	0.5	82	79	80	1.3	115	120	115	-4.2
	V	268	262	254	-3.1	214	202	195	-3.5	50	56	53	-5.4
Eastern Europe & USSR	Q	**488**	**697**	**668**	**-4.2**	**173**	**462**	**376**	**-18.6**	**291**	**218**	**275**	**26.2**
	V	322	384	339	-11.7	204	275	235	-14.6	108	101	96	-5.0
Other Developed Countries	Q	**1260**	**1380**	**1458**	**5.7**	**1184**	**1248**	**1346**	**7.9**	**60**	**116**	**86**	**-25.9**
	V	**4295**	**4268**	**4562**	**6.9**	**4258**	**4199**	**4503**	**7.2**	**27**	**58**	**43**	**-25.9**
Australia	Q	80	74	87	17.6	72	65	78	20.0	8	9	9	0.0
	V	221	198	234	18.2	217	194	230	18.6	3	4	3	-25.0
Israel	Q	23	32	30	-6.3	15	20	20	0.0	8	12	10	-16.7
	V	26	34	30	-11.8	22	28	26	-7.1	4	6	4	-33.3
Japan	Q	1112	1216	1267	4.2	1063	1115	1193	7.0	44	95	67	-29.5
	V	3974	3947	4197	6.3	3948	3891	4152	6.7	20	48	36	-25.0
South Africa	Q	38	51	67	31.4	27	41	48	17.1	...	...	...	-
	V	52	73	85	16.4	49	70	79	12.9	...	...	...	-

P = Preliminary

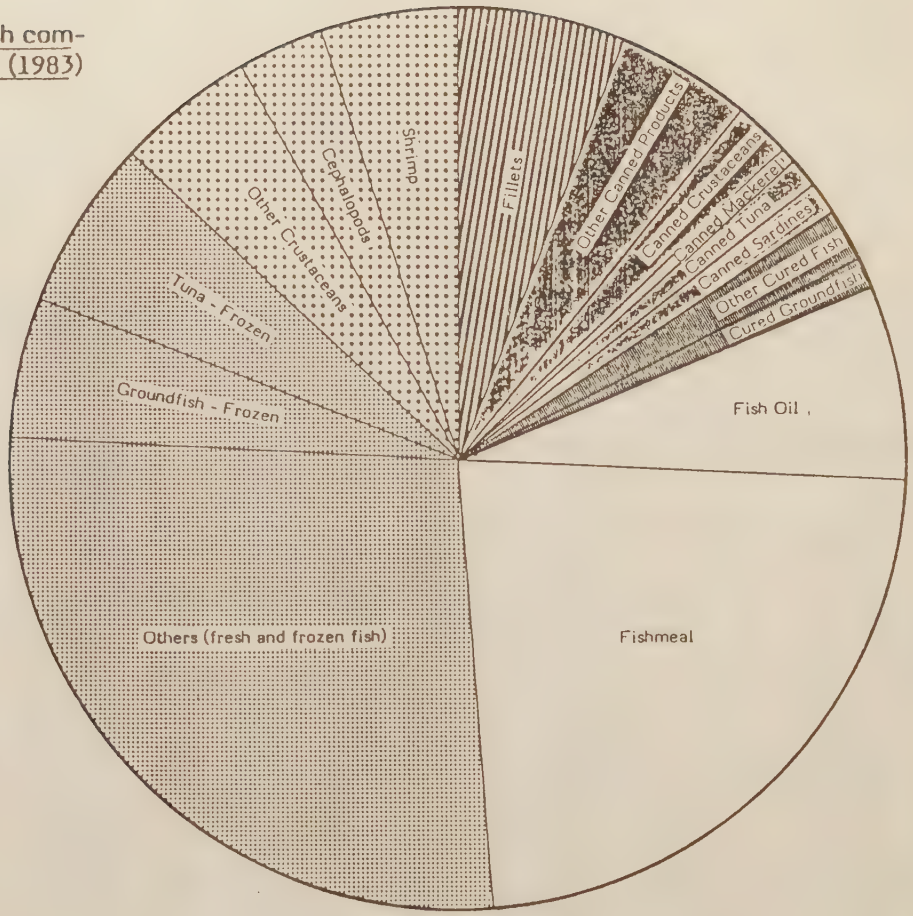
Continued

Table 3
(Continued)

		Total Fish Products				Fish For Human Consumption				Fishmeal			
		1982	1983	1984 P	84/83 %	1982	1983	1984 P	84/83 %	1982	1983	1984 P	84/83 %
DEVELOPING COUNTRIES	Q	2647	2311	2205	-4.6	1877	1592	1497	-6.0	730	646	689	6.7
	V	2457	2191	1956	-10.7	2088	1841	1673	-9.1	334	306	270	-11.8
Africa	Q	872	642	540	-15.9	840	606	500	-17.5	31	36	40	11.1
	V	586	448	337	-24.8	570	429	323	-24.7	12	15	14	-6.7
Ivory Coast	Q	125	110	100	-9.1	125	110	100	-9.1	...	...	...	-
	V	81	70	64	-8.6	81	70	64	-8.6	...	...	...	-
Nigeria	Q	544	317	250	-21.1	538	311	245	-21.2	7	6	5	-16.7
	V	358	235	167	-28.9	355	232	165	-28.9	2	3	2	-33.3
Senegal	Q	15	23	5	-78.3	15	23	5	-78.3	...	...	...	-
	V	14	21	4	-81.0	14	21	4	-81.0	...	...	...	-
Latin America	Q	371	358	298	-16.8	229	211	198	-6.2	108	79	84	6.3
	V	392	343	279	-18.7	310	269	237	-11.9	54	38	35	-7.9
Central America	Q	45	36	23	-36.1	12	10	10	0.0	32	25	12	-52.0
	V	42	32	19	-40.6	21	16	15	-6.3	20	16	4	-75.0
Caribbean	Q	108	104	92	-11.5	90	93	80	-14.0	17	11	12	9.1
	V	123	115	92	-20.0	116	111	88	-20.7	6	4	4	0.0
Cuba	Q	57	57	49	-14.0	42	48	40	-16.7	16	9	9	0.0
	V	35	36	28	-22.2	29	32	25	-21.9	6	4	3	-25.0
South America	Q	218	218	183	-16.1	127	108	108	0.0	59	43	60	39.5
	V	227	196	168	-14.3	173	142	134	-5.6	28	18	27	50.0
Brazil	Q	60	43	40	-7.0	60	43	40	-7.0	...	...	...	-
	V	77	43	36	-16.3	77	43	36	-16.3	...	...	...	-
Near-East (Africa & Asia)	Q	297	303	304	0.3	183	191	196	2.6	113	111	108	-2.7
	V	298	265	246	-7.2	242	216	209	-3.2	55	47	37	-21.3
Near-East (Africa) :	Q	117	157	169	7.6	88	98	105	7.1	28	59	64	8.5
	V	85	91	89	-2.2	68	65	67	3.1	16	25	22	-12.0
Egypt	Q	105	137	145	5.8	79	90	95	5.6	26	47	50	6.4
	V	67	69	68	-1.5	51	48	51	6.3	15	20	17	-15.0
Near-East (Asia) :	Q	180	146	135	-7.5	95	93	91	-2.2	85	52	44	-15.4
	V	213	174	157	-9.8	174	151	142	-5.9	39	22	15	-31.8
Iran, I.R.	Q	82	47	35	-25.5	6	5	5	0.0	77	42	30	-28.6
	V	38	21	12	-42.9	4	3	2	-33.3	35	18	10	-44.4
Saudi Arabia	Q	50	47	47	0.0	49	46	45	-2.2	1	1	2	100.0
	V	93	79	75	-5.1	92	78	74	-5.1	0	0	1	-
Asia	Q	1059	966	1019	5.5	577	542	559	3.1	477	420	457	8.8
	V	1114	1080	1043	-3.4	899	872	853	-2.2	213	206	184	-10.7
Southern Asia	Q	15	13	20	53.9	15	13	19	46.2	1	1	1	0.0
	V	16	12	16	33.3	16	12	16	33.3	...	...	...	-
East & South-East Asia :	Q	1044	953	999	4.8	562	529	540	2.1	476	419	456	8.8
	V	1098	1068	1027	-3.8	883	860	837	-2.7	213	206	184	9.5
Taiwan (Province of China)	Q	237	223	241	8.1	9	11	10	9.1	226	210	230	9.5
	V	150	164	138	-15.9	41	50	40	-20.0	109	113	97	-14.2
Hong Kong	Q	147	143	139	-2.8	117	124	117	-5.7	29	19	22	15.8
	V	469	440	406	-7.7	457	432	397	-8.1	13	7	9	28.6
Korea, Rep.of	Q	81	77	88	14.3	78	66	80	21.2	2	10	7	-30.0
	V	56	55	66	20.0	55	50	61	22.0	1	5	4	-20.0
Malaysia	Q	184	161	153	-5.0	139	125	115	-8.0	44	36	38	5.6
	V	100	88	79	-10.2	88	80	71	-11.3	11	8	8	0.0
Thailand	Q	83	25	88	252.0	46	59	88	49.2	...	...	...	-
	V	52	12	66	450.0	28	43	66	53.5	...	...	...	-
Singapore	Q	175	159	170	6.9	113	119	120	0.8	61	39	49	25.6
	V	184	197	215	9.1	157	181	193	6.6	26	15	21	40.0
Other Developing Countries	Q	47	41	44	7.3	46	41	44	7.3	1	...	...	-
	V	66	54	51	-5.6	66	54	51	-5.6	0	...	...	-

The share of major fish commodities in fish trade (1983)

VOLUME



Crustaceans & Molluscs

Frozen Fish (excl. Fillets)

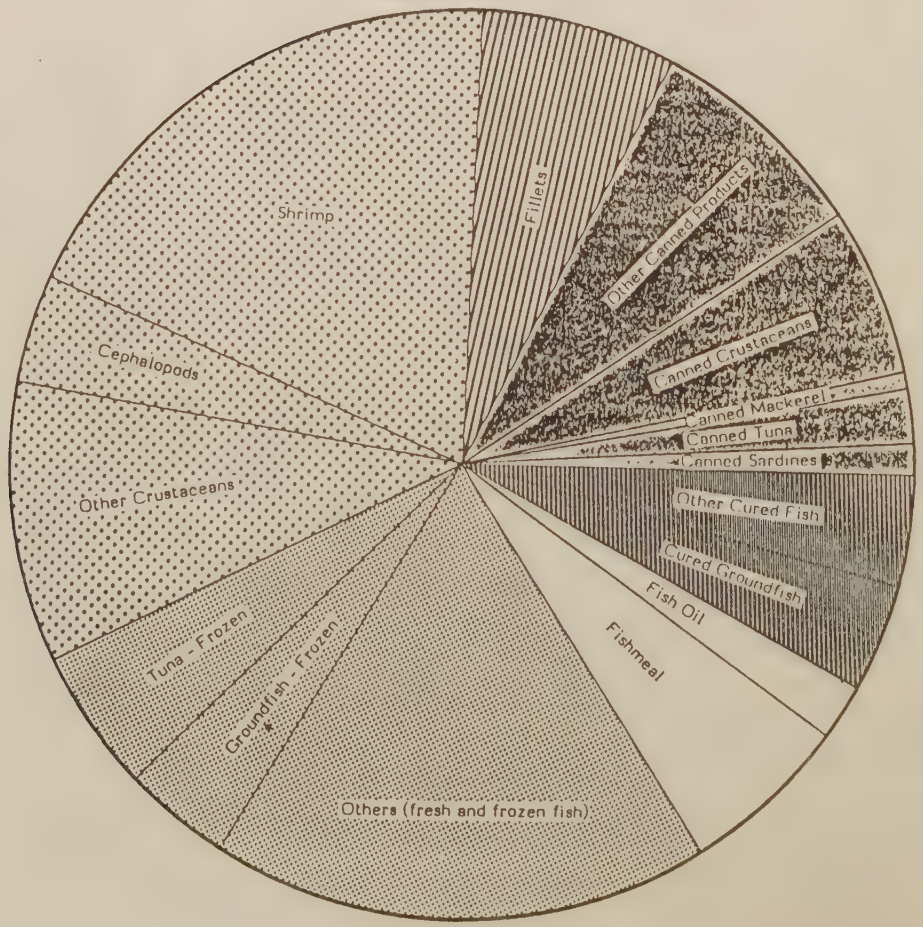
Fishmeal & Fish Oil

Cured Fish

Canned Fish

Fillets

VALUE



1984 Summary of Major Fishery Commodity Markets

FROZEN TUNA

GLOBEFISH SNAPSHOT
(1984 as compared to 1983)

		USA	Japan	Europe	Thailand
Landings	: Albacore	-	up	NA	-
	Others	unchanged	up	NA	-
Imports	: Albacore	up	down	NA	-
	Others	down	down	slightly down	up
Exports	: Albacore	-	up	-	-
	Others	-	up	-	-
Demand	: Albacore	up	firm	down	-
	Others	down	unchanged		up
Prices	: Albacore	up	up	NA	-
	Others	down	down		down
Cold Storage	: Albacore	NA	down	NA	-
	Others		down		-

- not of relevance NA not available in GLOBEFISH

Total 1984 tuna landings were above 1983 levels, as Japan and Mexico reported higher landings, and US tuna catch was only slightly below 1983 figures. Prices for skipjack and yellowfin remained generally depressed throughout 1984, because of a persistent over-supply of skipjack, while prices for albacore were firm. About 80 percent of total tuna landings are directed to the canning industries, and thus most of the internationally-traded frozen tuna (560,000-590,000 tons) are used as canning material.

In 1984, **total fresh and frozen tuna imports into the US were 183,354 tons, down 8 percent from 1983.** Albacore imports, however, were up by 34 percent and now represent 30 percent of total US imports. Tuna landings in Japan increased in 1984, because of higher skipjack and albacore landings. Consequently, Japanese 1984 fresh and frozen tuna imports were down by 19 percent to a total of 104,019 tons. On the other hand, **Japan expands its role as a tuna exporter,** shipping about 85,000 tons of tuna, up 70 percent from 1983. The main contribution was the large skipjack shipments to Thailand (27,000 tons) and albacore export to the USA. **Imports of frozen tuna by European countries decreased,** which confirms the trend of moving tuna canning operations into low labour-cost countries.

USA
Fresh and Frozen Tuna
IMPORTS
in 1000 lbs

Country of origin	1982	1983	1984
Japan	87,355	106,291	117,873
Taiwan, PC	54,868	35,659	53,223
Ghana	29,351	46,789	35,504
Panama	47,830	24,893	34,822
France	47,039	35,653	23,429
Venezuela	21,198	20,630	17,814
Korea, Rep. of	14,404	26,239	13,986
Brazil	29,916	28,587	13,415
Singapore	5,476	1,589	7,464
Philippines	15,029	13,440	3,851
Cayman Islands	17,270	8,622	697
Indonesia	8,596	9,457	374
Spain	19,511	6,180	-
Other countries	87,210	75,050	81,767
Total :	485,053	439,079	404,219

JAPAN
Frozen Tuna
IMPORTS
in MT

		Total	Korea Rep. of	Taiwan PC	Panama
Skipjack	: 1982	21,700	1,689	57	20
	1983	9,810	779	54	5
	1984	797	81	17	395
Albacore	: 1982	2,997	692	1,432	82
	1983	7,638	745	4,600	35
	1984	5,575	861	113	219
Yellowfin Tuna	: 1982	48,192	19,277	13,892	1,585
	1983	57,742	26,858	15,944	1,509
	1984	48,770	17,250	14,594	1,653
Bluefin Tuna	: 1982	1,049	32	270	1
	1983	3,856	13	220	-
	1984	4,226	20	382	-
Bigeye Tuna	: 1982	46,397	27,278	11,403	2,670
	1983	52,932	30,831	14,654	2,245
	1984	46,651	25,985	12,877	3,165
GRAND TOTAL	: 1982	120,355	48,968	27,054	4,358
	1983	131,978	59,226	35,472	3,794
	1984	104,019	44,197	27,983	5,432

CANNED TUNA

GLOBEFISH SNAPSHOT
(1984 as compared to 1983)

		USA	Japan	Thailand	Europe
Production	: Whitemeat	up	up	-	unchanged
	Lightmeat	down	up	up	
Exports	: Whitemeat	-	unchanged	-	-
	Lightmeat	-	up	up	-
Imports	: Whitemeat	-	-	-	up
	Lightmeat	up	-	-	
Demand	: Whitemeat	up	unchanged	-	good
	Lightmeat	up		-	
Prices	: Whitemeat	unchanged	down	-	down
	Lightmeat	down	down	down	

- not of relevance NA not available in GLOBEFISH

The international canned tuna market in 1984 was characterized by record imports to the USA. In particular, imports of canned lightmeat tuna increased by 33 percent to a total of 73,600 tons. **Thailand,** which more than doubled the 1983 shipments, **reached the lion's share of 55 percent of total US canned tuna imports.** The share of imported canned tuna in total canned tuna supply to the US market reached a record level of 20 percent, as compared to 18 percent in 1983, and 10 percent in 1981. The wholesale price of canned lightmeat tuna in the USA market remained under the **1983 level,** while wholesale prices of whitemeat tuna climbed steadily in 1984. **Japanese canned tuna exports expanded by 22 percent,** for a total of 41,000 tons. This was mainly boosted by higher canned skipjack exports to the UK (+123%) and to the USA. In addition to the higher Japanese shipments, UK imported also more canned tuna from Ivory Coast, Fiji, Mauritius, Thailand and Senegal, resulting in a 37 percent of overall imports. France and Germany Fed. Rep. reported stable imports.

Major producing countries of Canned Tuna
(in 1000 MT product weight)

	1977	1978	1979	1980	1981	1982	1983	1984
USA	257	265	283	275	287	246	268	275E
Japan	75	88	95	95	111	113	117	124
Italy	40	42	43	48	49	48	52	51E
Thailand	...	...	...	...	...	...	24E	49E
France	33	29	27	25	23	30	35	34E
Spain	39	41	41	43	40	37	32	30E
Ivory Coast	16	13	14	18	26	29	26	26E
Mexico	6	10	15	15	20	13	12	...
Ecuador	3	3	5	5	12	11	7	...
Others	34	90	27	53	70	65	74	...
Total :	503	581	550	577	638	592	647	(682)

E = estimates

U S A
Canned Tuna
IMPORTS
in million lbs

	1979	1980	1981	1982	1983	1984
Whitemeat :	15.3	17.0	12.6	11.3	15.1	14.8
Taiwan (PC)	2.0	3.2	4.0	2.5	6.4	6.6
Japan	12.3	12.8	7.2	7.7	5.7	NA
Lightmeat :	53.7	63.6	58.0	76.3	107.3	150.5
Thailand	4.7	6.0	8.0	12.9	39.0	88.9
Philippines	7.0	13.5	16.8	19.7	25.7	NA
Japan	16.0	10.0	9.3	11.1	8.1	NA
Taiwan (PC)	10.2	12.2	8.7	4.5	7.4	NA

FRESH AND FROZEN GROUNDFISH

GLOBEFISH SNAPSHOT
(1984 as compared to 1983)

	Canada	USA	Japan	Europe	Latin America
Landings	down	-	up	down	down
Imports	-	down	up	down	-
Exports	down	-	-	down	down
Demand	-	good	steady	good	-
Average Prices	up	firm	firm	NA	weak
Cold Storage : Average Trend	down up	down up	up NA	NA	NA

- not of relevance NA not available in GLOBEFISH

There was a **further decrease in Atlantic Groundfish production** in 1984, as all three major cod producing countries - Canada, Iceland and Norway - recorded lower landings. Also hake landings by Argentina, Uruguay and South Africa decreased. On the other hand, **Alaska pollack catch was reportedly up** for Japan, USSR and Korea Rep.

Overall groundfish imports into the USA decreased, as block imports of major frozen commodities were down 27,000 tons to a year-end total of 283,000 tons. In the first half of 1984, groundfish prices in the USA were low, but they increased sharply in the second half, because of low supply. In the UK, total 1984 cod imports were 10 percent higher than in 1983, while French imports stayed on 1983 levels. **Japan is becoming an important market for cod;** in 1984 94,000 tons were imported, 18 percent more than in 1983.

USA
Cod
IMPORTS
in 1000 lbs

Country of origin	1982	1983	1984
Argentina	12.8	12.6	4.1
Canada	108.5	123.7	100.5
Denmark	31.9	53.7	63.7
Greenland	15.3	14.6	5.3
Iceland	49.5	60.3	47.5
Japan	6.1	10.8	8.6
Korea, Rep. of	41.2	57.1	50.9
Norway	24.6	26.3	19.4
Total :	319.0	384.5	316.2

CEPHALOPODS

GLOBEFISH SNAPSHOT
(1984 as compared to 1983)

	Japan	Spain	Italy	Thailand
Landings	up	up	NA	up
Imports :	up	up	unchanged	-
Squid	unchanged			
Octopus	up			
Exports	-	up	-	up
Demand	moderate	slow	dull	-
Prices	unchanged	down	unchanged	down
Cold Storage	unchanged	NA	NA (probably up)	NA

- not of relevance NA not available in GLOBEFISH

The principal markets for cephalopod products continued to be Japan, Spain and Italy. 1984 landings of squid in Japan were reported 10 percent above 1983 levels. Imports were 102,000 tons of squid and cuttlefish with Poland and Republic of Korea as major suppliers - virtually the same result as in 1983. The **Japanese octopus market** which is 90 percent supplied by imports **was strong in 1984.** Imports increased by 6 percent to 101,000 tons, with Spain as major supplier. **In Europe, the market for cephalopods** throughout 1984 **was generally unfavourable** characterized by high inventories and low prices in Spain and by an increasing consumer resistance to high prices in Italy. France experienced a poor market due to currency problems.

EUROPE
Cephalopods
IMPORTS
in 1000 tons, product weight

		J	F	M	A	M	J	J	A	S	O	N	D	Cumulative
														Jan-Nov
Spain :	1983	2.5	1.7	1.3	1.4	6.4	7.0	4.2	3.9	2.3	1.7	6.4	9.7	38.8
	1984	3.4	4.5	3.3	5.7	4.0	7.3	6.8	9.1	3.5	6.6	4.5		58.7
														Jan-Sept
Italy :	1983	2.7	2.7	2.4	2.2	2.0	1.9	3.4	9.8	4.3	5.4	7.3	4.6	31.4
	1984	2.3	4.2	2.3	3.1	2.2	3.6	1.3	4.6	6.5				30.1
														Jan-Nov
France :	1983	1.1	0.8	0.9	1.2	1.1	1.4	1.3	0.9	0.6	0.8	1.1	0.8	11.2
	1984	0.9	0.9	1.0	0.9	0.9	0.9	1.4	2.1	0.9	0.8	0.8		11.5

CANNED SMALL PELAGICS

GLOBEFISH SNAPSHOT
(1984 as compared to 1983)

	Japan	Europe	USA	West Africa	Peru/Chile
Supply to Canneries	up	down	-	down	up
Imports	-	up	up	down	-
Exports	down	down	-	down	up
Demand	-	up	up	down	-
Prices	-	down	down	up	-

- not of relevance NA not available in GLOBEFISH

While the quantity of canned pilchard entering world trade was higher in 1984 than in 1983, mainly because of the recovery of Peruvian exports, **1984 was a difficult year for canned Mediterranean sardine and canned mackerel.** The latter were strongly affected by the import restrictions by West African countries and by the Philippines. The Nigerian market, which accounted for more than 40 percent of Japanese canned mackerel exports in 1982 (46,886 tons) and for 20 percent in 1983, was nil in 1984. Papua New Guinea is at present the major outlet for canned mackerel from Japan, absorbing about 20,000 tons in 1984, which gives an apparent per caput consumption of 5.7 kg/year for this commodity.

The USA and the UK, the major developed markets for canned sardines and pilchards, **reported sharply increased imports.** Shipments of canned sardines and pilchards to the USA reached 20,000 tons, up 27 percent from 1983, but still not reaching the 1982 levels. Japan, Peru and Norway were the major supplying countries.

UK imports of canned sardines and pilchards jumped to 23,500 tons, a 14 percent increase over 1983. Portugal dominated the canned Mediterranean sardine market in the UK, further eroding Morocco's share. Japan was the major supplier of canned pilchard, but Peru recovered to a 38 percent market share. Prices of canned small pelagics were generally lower in 1984 than in 1983, especially for canned mackerel.

UK
Canned Sardines
IMPORTS
in 1000 cartons, 48 x 0.5 s club

	1981	1982	1983	1984
Portugal	461.3	823.0	897.7	1,144.9
Morocco	419.3	145.8	455.5	414.2
Italy	76.4	366.3	186.5	216.6
Spain*	229.4	80.6	91.8	29.3
Other countries	133.6	13.6	77.0	101.1
Total :	1,320.0	1,429.3	1,708.5	1,906.1

* Includes imports from Canary Islands

USA
Sardines, Pilchards and Sprats
IMPORTS
in million lbs

	1982	1983	1984
In oil :			
Canada	2.6	2.4	2.8
Norway	5.4	5.6	6.8
Yugoslavia	1.4	3.7	1.2
Other countries	2.4	2.1	3.4
Total :	14.1	17.1	17.5
Not in oil :			
Peru	24.3	3.2	8.0
Japan	5.8	6.6	10.7
Other countries	5.8	8.2	8.5
Total :	35.9	18.0	27.2
GRAND TOTAL :	50.0	35.1	44.7

FISHMEAL

GLOBEFISH SNAPSHOT
(1984 as compared to 1983)

	Chile	Peru	Denmark	Norway	Japan	USA	Germany Fed.Rep.
Production	up	up	unchanged	down	up	down	unchanged
Exports	up	up	unchanged	down	up	down	up
Imports	-	-	-	-	down	up	down
Demand	-	-	-	-	unchanged	moderate	slow
Prices	down	down	down	down	down	down	down
Stocks	up	down	unchanged	unchanged	up	NA	down

- not of relevance NA not available in GLOBEFISH

There was a substantial increase in fishmeal production in 1984, mainly due to higher Chilean production, the recovery of the Peruvian fishing industry after the negative consequence of the "El Niño" phenomenon, and the higher Icelandic capelin catch. Total fishmeal production is presently estimated at 5.0 million tons. 1984 fishmeal imports reportedly reached 2.34 million tons, as compared with 2.24 million tons in 1983. The downward pressure on fishmeal prices continued and, because of low soyabean meal prices, overall demand for fishmeal was sluggish. Increased imports were reported by China and the USSR.

WORLD
Fishmeal
IMPORTS
in 1000 MT

	1981	1982	1983	1984
EEC	613	858	753	736
USSR & Others - E. Europe	322	372	314	330
China	NA	67	47	95
USA	54	77	62	76
Japan	84	44	95	67
South Africa	-	69	53	54
Total (incl. 'Others') :	2,010	2,523	2,243	2,347

FISH OIL

GLOBEFISH SNAPSHOT
(1984 as compared to 1983)

	Japan	Norway	USA	EEC
Production	up	down	unchanged	unchanged
Exports	up	down	unchanged	unchanged
Imports	-	-	-	up
Demand	-	-	-	moderate
Prices	down	down	down	down
Stocks	down	up	down	up

- not of relevance NA not available in GLOBEFISH

World production of fish oil for 1984 is estimated at 1.29 million tons, the same level as in 1982, as against 1.12 million tons in 1983. The 1984 increase was mainly due to higher production in Chile, Peru, Iceland and Japan. World fish oil exports rose to a record level of 960,000 tons. This increased use of fish oil in the main consuming countries was to offset the sharp reduction in the suppliers of soyabean, sunflower, palm and vegetable oils. Fish oil prices declined almost continuously until October 1984, when they strengthened slightly, but prices still remain about US$ 150/ton below the first quarter of 1984.

WORLD
Fish Oil
IMPORTS
in 1000 MT

	1981	1982	1983	1984
Federal Republic of Germany	177	190	161	223
UK	222	249	197	216
Netherlands	153	184	179	229
EEC	602	673	584	738
Eastern Europe	12	15	9	14
USA	10	7	9	7
Japan	2	2	4	5
Total (incl. 'Others') :	736	794	750	959

FROZEN SHRIMP

GLOBEFISH SNAPSHOT
(1984 as compared to 1983)

	USA	Japan	Europe
Landings	up	unchanged	up
Imports	up	up	down
Exports	-	-	up
Demand	good	moderate	slow
Price :			
Average	down	down	down
Trend	firming up	firming up	up
Cold Storage :			
Average	up	unchanged	NA
Trend	down	up	NA

- not of relevance NA not available in GLOBEFISH

Total world landings of shrimp in 1984 were abundant. More shrimp entered the international market, and prices were generally down. **1984 was characterized by record supplies in the USA and record imports in Japan.** The high shrimp supplies in the USA were mainly due to higher domestic production which reached 77,600 tons, up 19 percent over 1983. Shrimp imports remained steady at the high 1983 level of 155,000 tons, but there was a diversification in supply pattern. All three of the traditionally major supplies - Mexico, Ecuador and India - lost ground, while countries like Brazil, Pakistan and El Salvador could increase their shipments to the USA. The heavy 1984 demand, mainly because of low prices and higher incomes in the USA, kept supplies moving and the **US apparent shrimp consumption reached a record level** of 1 kg per caput in 1984, as compared to 0.82 kg in 1981.

In Japan, 1984 shrimp imports reached a record high of just under 170,000 tons, 14 percent ahead of 1983, and a full 5 percent above the previous record established in 1981. India (38,500 tons) and Indonesia (24,000 tons) remained the major suppliers, while China and Taiwan (Province of China) increased their market shares. These high imports, combined with domestic landings of some 53,000 tons and a relatively sluggish consumer demand drove cold storage holdings of shrimp to 50,000 tons in November. **Prices were generally depressed,** but they still remained above 1980-1982 levels.

The European market for tropical shrimp was generally **slow in 1984,** because of the high US dollar, the Dutch food poisoning case, combined with the good availability and low prices of cold water shrimp.

U S A
Tropical Shrimp
LANDINGS
in million lbs

Month	1980	1981	1982	1983	1984
January	5.3	4.5	4.9	5.2	4.0
February	3.1	2.2	3.6	3.0	3.2
March	3.1	3.8	3.2	2.6	3.8
April	2.7	4.8	3.1	3.3	2.5
May	9.4	20.4	17.3	11.0	12.0
June	19.9	27.9	24.3	22.7	33.8
July	17.4	25.4	20.3	18.5	22.7
August	19.9	25.0	15.9	20.4	22.7
September	21.2	18.3	15.0	14.7	14.9
October	23.7	20.9	18.3	17.7	18.0
November	14.4	17.8	14.6	14.2	15.4
December	17.0	11.1	8.6	8.3	17.4
Total :	157.1	182.1	149.1	141.6	170.4

JAPAN
Shrimp
CUMULATIVE MONTHLY IMPORTS
in 1000 MT

Month	1980	1981	1982	1983	1984
January	9.9	13.8	12.3	12.3	12.4
February	21.4	25.7	21.5	23.7	24.7
March	31.6	37.9	31.8	35.4	39.8
April	40.7	50.5	44.6	49.3	54.0
May	61.0	63.9	58.4	60.4	66.5
June	62.9	75.9	70.6	72.8	79.0
July	74.8	87.9	84.0	83.9	93.2
August	88.0	100.1	95.8	93.3	108.3
September	101.3	113.9	107.3	101.1	121.1
October	116.3	131.7	120.7	117.0	135.9
November	128.6	145.0	135.5	113.2	153.9
December	143.3	161.8	151.4	148.6	169.4

OUTLOOK - 1985

World fish catch in 1985 is not expected to grow over the record level of 80 million tons reached in 1984. On the contrary, anticipated lower small pelagic catches by Latin American countries, quota restrictions in the US conservation zone and for Norwegian capelin catch, and management measures for Japanese small pelagic stocks could pull the world catch downwards, however, affecting more the fishmeal than the food fish production. Supply of cod is expected to be on the low side in 1985, while hake production is likely to recover from the depressed 1984 levels.

World trade in seafood products is expected to expand in value terms, while volume terms could be negatively affected by lower availability of those products not fit for human consumption (fishmeal, fish oil). The major importing countries, Japan and USA, will increase their imports of high value products (shrimp, lobster), because of the generally positive economic situation, which will result in a higher demand for such products. Market conditions in Western Europe will highly depend on the fluctuation of exchange rates. Demand recovery can be anticipated in case of an overall weakening of the US dollar.

Prices will firm up in 1985 over the generally low 1984 level (tuna, fishmeal, fish oil, shrimp). Anticipated price increases of canned tuna could negatively affect the trade of this commodity.